SERFF Tracking Number: LPTI-127821992 State: Arkansas
Filing Company: Life Policy Traders Inc. State Tracking Number: 50400

Company Tracking Number: LPT-AR-024

TOI: VS01 Viatical Settlements Sub-TOI: VS01.000 Viatical Settlements

Product Name: Life Settlement

Project Name/Number: Trust Beneficiary Consent/LPT-AR-024

### Filing at a Glance

Company: Life Policy Traders Inc.

Product Name: Life Settlement SERFF Tr Num: LPTI-127821992 State: Arkansas
TOI: VS01 Viatical Settlements SERFF Status: Closed-Approved-State Tr Num: 50400

Closed

Sub-TOI: VS01.000 Viatical Settlements

Filing Type: Form

Co Tr Num: LPT-AR-024 State Status: Approved-Closed

Reviewer(s): Linda Bird

Implementation Date:

Author: Edward Johnson Disposition Date: 12/09/2011

Date Submitted: 12/05/2011 Disposition Status: Approved-

Closed

Implementation Date Requested: On Approval

State Filing Description:

General Information

Project Name: Trust Beneficiary Consent

Project Number: LPT-AR-024

Requested Filing Mode: Review & Approval

Explanation for Combination/Other: Submission Type: New Submission

Overall Rate Impact:

Deemer Date:

Submitted By: Edward Johnson

Filing Description:

To Whom it May Concern,

Status of Filing in Domicile: Authorized

Date Approved in Domicile:
Domicile Status Comments:
Market Type: Individual

Individual Market Type:

Filing Status Changed: 12/09/2011 State Status Changed: 12/09/2011

Created By: Edward Johnson

Corresponding Filing Tracking Number:

On behalf of Life Policy Traders, Inc., I have submitted the company's closing document form LPT-AR-024, "Trust Beneficiary Consent to Sale of Policy," to be used by the company in connection with Life Settlement transactions. Please note that this is a new submission, and this form has been added to the forms which were previously approved by your office.

Please feel free to contact me if you have any questions or require any additional information. I can be reached at 973-299-4480. By e-mail I can be reached at ejohnson@lptsettlements.com.

SERFF Tracking Number: LPTI-127821992 State: Arkansas
Filing Company: Life Policy Traders Inc. State Tracking Number: 50400

Company Tracking Number: LPT-AR-024

TOI: VS01 Viatical Settlements Sub-TOI: VS01.000 Viatical Settlements

Product Name: Life Settlement

Project Name/Number: Trust Beneficiary Consent/LPT-AR-024

Very truly yours,

**Edward Johnson** 

### **Company and Contact**

#### **Filing Contact Information**

Edward Johnson, Chief Operating Officer ejohnson@lptsettlements.com

 48 Water Street
 973-299-4480 [Phone]

 Newton, NJ 07960
 866-214-8261 [FAX]

**Filing Company Information** 

Life Policy Traders Inc.

CoCode: State of Domicile: New Jersey
48 Water Street Group Code: Company Type: Incorporated

Newton, NJ 07960 Group Name: State ID Number:

(973) 299-4480 ext. [Phone] FEIN Number: 20-5723032

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### **Filing Fees**

Fee Required? Yes
Fee Amount: \$50.00
Retaliatory? No

Fee Explanation:

Per Company: No

COMPANY AMOUNT DATE PROCESSED TRANSACTION #

Life Policy Traders Inc. \$50.00 12/05/2011 54257998

Company Tracking Number: LPT-AR-024

TOI: VS01 Viatical Settlements Sub-TOI: VS01.000 Viatical Settlements

Product Name: Life Settlement

Project Name/Number: Trust Beneficiary Consent/LPT-AR-024

## **Correspondence Summary**

#### **Dispositions**

Status	Created By	Created On	Date Submitted	
Approved- Closed	Linda Bird	12/09/2011	12/09/2011	

SERFF Tracking Number: LPTI-127821992 State: Arkansas
Filing Company: Life Policy Traders Inc. State Tracking Number: 50400

Company Tracking Number: LPT-AR-024

TOI: VS01 Viatical Settlements Sub-TOI: VS01.000 Viatical Settlements

Product Name: Life Settlement

Project Name/Number: Trust Beneficiary Consent/LPT-AR-024

## **Disposition**

Disposition Date: 12/09/2011

Implementation Date: Status: Approved-Closed

Comment:

Rate data does NOT apply to filing.

Company Tracking Number: LPT-AR-024

TOI: VS01 Viatical Settlements Sub-TOI: VS01.000 Viatical Settlements

Product Name: Life Settlement

Project Name/Number: Trust Beneficiary Consent/LPT-AR-024

Schedule Item Status Public Access **Schedule** Schedule Item Consent to Release Medical Records **Supporting Document** No **Supporting Document Escrow Agreement** No **Supporting Document** Physician Statement No **Supporting Document** Power of Attorney No Trust Beneficiary Consent to Sale of **Form** Yes

Policy

Company Tracking Number: LPT-AR-024

TOI: VS01 Viatical Settlements Sub-TOI: VS01.000 Viatical Settlements

Product Name: Life Settlement

Project Name/Number: Trust Beneficiary Consent/LPT-AR-024

#### Form Schedule

Lead Form Number: LPT-AR-024

Schedule Item Status	Form Number	Form Type	Form Name	Action	Action Specific Data	Readability	Attachment
	LPT-AR- 024	Other	Trust Beneficiary Consent to Sale of Policy	Initial			LPT-AR-024 TRUST BENEFICIAR Y CONSENT.pd f



#### **Life Policy Traders, Inc.**

48 Water Street Newton, NJ 07860 Tel: 973-299-4480 Fax: 866-214-8261

Email: info@lifepolicytraders.com

# TRUST BENEFICIARY CONSENT TO

(If multiple Trust be	eneficiaries, a separate	consent mu	ıst be signed by	each beneficiary)	
I, "Trust").«M_2_Seller_1_Full_N «M_44_Policy_Number» (the " life of «M_20_Insured_1 «M_31_Insured_2_Last_Name	ame» is the owner Policy"), issued by <b>«M_38</b> _ _First_Name» «M_21_Ir	and benef Carrier_Nan	iciary of Life <b>ne»</b> (the "Life Insu	rance Company"), ins	Number suring the
I understand that <b>«M_2_Seller_</b> under the Policy if the Insured d direction of its Trustees, is sellin to Life Policy Traders, Inc., a Deentity (collectively, the "Buyer").	ies while the Trust is a name g, assigning, conveying and	ed beneficiar d transferring	y of the Policy. I u all the Trust's righ	nderstand that the Trut, title and interest in t	ist, at the he Policy
I acknowledge and understand twill change the named beneficia of «M_2_Seller_1_Full_Name»	ry of the Policy from the Tru	ust to the Buy	er or its designee	and therefore, as a be	eneficiary
In consideration of the benefit conveyance and transfer of the to the Buyer or its designee as t	Policy to the Buyer and the	Trust's chang			
I forever waive, release and disc whatever kind and character, in successors, arising out of or in the Buyer and (b) the Trust's including all rights to receive any	ncluding, without limitation, connection with (a) the Trus change of the named bene	against the t's sale, assi- eficiary of the	Buyer or its desig gnment, conveyan	nee or any of their a ce and transfer of the	ssigns or Policy to
I further agree, upon request, to limitation, any forms provided by right, title and interest in and to the	the Life Insurance Compa	ny, which ma	y be necessary or	desirable to vest mo	
This Trust Beneficiary Consent executors and administrators.	to Sale of Policy shall be	binding on	my heirs, assigns	s, successors, repres	entatives,
	_				
Print name of Beneficiary	_	Date		-	
Signature of Witness	Name of Witness (print or ty	ype)	Date		

Address of Witness

Company Tracking Number: LPT-AR-024

TOI: VS01 Viatical Settlements Sub-TOI: VS01.000 Viatical Settlements

Product Name: Life Settlement

Project Name/Number: Trust Beneficiary Consent/LPT-AR-024

# **Supporting Document Schedules**

Item Status: Status

Date:

Bypassed - Item: Consent to Release Medical

Records

Bypass Reason: N/A

Comments:

Item Status: Status

Date:

Bypassed - Item: Escrow Agreement

Bypass Reason: N/A

Comments:

Item Status: Status

Date:

Bypassed - Item: Physician Statement

Bypass Reason: N/A

**Comments:** 

Item Status: Status

Date:

Bypassed - Item: Power of Attorney

Bypass Reason: N/A

Comments: